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Introduction

This draft standard is based on national and international discussions. Your comments on this draft are invited and will assist in the preparation of the consequent standard.

For international standards, comments will be reviewed by the relevant UK national committee before sending the consensus UK vote and comments to the international committee, which will then decide appropriate action. If the international standard is approved, it is usual for the text to be published as a British Standard.

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Template for comments and secretariat observations

Date: xx/xx/20xx	Document: ISO/DIS xxxx
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1	2	(3)	4	5	(6)	7
MB	Clause No./ Subclause No./Annex (e.g. 3.1)	Paragraph/ Figure/Table/Note	Type of comment	Comment (justification for change) by the MB	Proposed change by the MB	Secretariat observations on each comment submitted
	3.1	Definition 1	ed	Definition is ambiguous and needs clarifying.	Amend to read '...so that the mains connector to which no connection...'	
	6.4	Paragraph 2	te	The use of the UV photometer as an alternative cannot be supported as serious problems have been encountered in its use in the UK.	Delete reference to UV photometer.	



DRAFT International Standard

ISO/DIS 41002

Facility management — Development of the facility management organization

*Facility Management — Développement de l'organisation du
Facility Management*

ICS: 03.080.10

ISO/TC 267

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

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This document was prepared by Technical Committee ISO/TC 267, *Facility management*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

General

Facility management (FM) integrates multiple disciplines in order to have an influence on the efficiency and productivity of economies of societies, communities and organizations, as well as the manner in which individuals interact with the built environment. FM affects the safety, well-being and quality of life of much of the world's societies and population through the services it manages and delivers (see ISO 41001).

NOTE FM is defined as an organizational function which integrates people, place and process within the built environment with the purpose of improving the quality of life of people and the productivity of the core business (see ISO 41011:2024, 3.1.1).

ISO 41001 makes reference to the demand organization and to the organization responsible for FM, including the delivery of facility services. A distinction is necessary because of the variable nature in which FM is organized and where facility services might be delivered through personnel within the demand organization, through external service providers or a combination of the two. If FM is working efficiently and effectively, the users of a facility can expect the same quality of service regardless of whether the FM organization is internal or external to the demand organization.

This document is based upon the simple premise that a demand organization requires an arrangement internally, externally or through a combination of the two, to take responsibility for FM, including the delivery of facility services.

FM organizations have existed as long as FM itself. Many FM organizations could be held up as models of efficiency and effectiveness, which others could use to inform their own development of an FM organization. The benefits of having a formal FM organization include:

- a ready source of skills, knowledge and experience in FM on the strategic, tactical and operational management levels;
- an efficient, responsive and cost-effective function in support of the demand organization's business objectives, strategy and plans;
- a function for managing compliance with statutory and demand organization requirements affecting the operation of the facility, including the health, safety, security and well-being of users;
- a function for implementing measures to minimize the impact of climate change on the facility and for contributing to goals and targets consistent with sustainable development.

This document fills a gap in guidance and is applicable to any individual or entity that owns, operates or manages a facility, or advises on its management, with the intention of:

- providing appropriate support for the demand organization's core business;
- satisfying the needs of users of the facility and other interested parties;
- complying with statutory and other legal requirements;
- simplifying and clarifying the management of the facility;
- driving organizational change and improving operational efficiency;
- accessing strategic, tactical and operational FM from the market, where appropriate;
- utilization of technology;
- acting responsibly in regard to action on climate change, sustainable development and resilience.

The guidance in this document applies to both an internal and external FM organization.

Process approach

This document underscores a management-led approach to FM, including the delivery of facility services of whatever kind. It is explicit in the definition of an FM organization that it is able to function on all three management levels: strategic, tactical and operational. The ability of the FM organization to provide an efficient, responsive and effective function in support of the demand organization's business objectives, strategy and plans necessitates processes that ensure continuity of purpose through all three management levels.

The document emphasizes the mutual interdependence between the demand organization and its FM organization. The former's success depends on the latter and the reverse. For this relationship to succeed and thrive well into the future, there needs to be purposeful application of the guidance and recommendations in this document by top management in the demand organization and, where the FM organization is external, the service provider's top management.

The context for an external service provider acting as the FM organization is different to that of an internal (or in-house) service provider. An external service provider acting as the FM organization, and operating on all three management levels, is likely to be serving the needs of multiple demand organizations simultaneously; whereas the internal service provider has one demand organization to satisfy. In many countries, the market for FM comprises few large service providers but many more smaller service providers. Not all of the latter are expected to operate fully on all three management levels, although they might aspire to do so.

This document provides guidance with recommendations on how internal and external FM organizations can develop and enhance their capabilities on all three management levels. It identifies the decisions, functions, processes, information, data and interested parties that enable the demand organization to form the essential foundation for the FM organization, whether it is internal or external. The subject matter includes governance, value drivers, risk, stakeholder engagement, organizational structure and factors impacting the success of the FM organization.

Facility management — Development of the facility management organization

1 Scope

This document gives guidance on the development of a facility management (FM) organization working on the strategic, tactical and operational management levels to:

- a) satisfy the needs and objectives of the demand organization and users of its facility;
- b) meet the needs of interested parties and applicable FM requirements consistently;
- c) provide a safe, healthy, secure and efficient environment that enhances the workplace experience for users;
- d) protect the asset value and resource value of the facility;
- e) provide appropriately specified, responsive and cost-effective facility services;
- f) implement measures to minimize the impact of climate change on the facility;
- g) contribute to goals and targets consistent with sustainable development;
- h) improve the usefulness and benefits provided by the FM system.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 41001, *Facility management — Management systems — Requirements with guidance for use*

ISO 41011, *Facility management — Vocabulary*

ISO 41012, *Facility management — Guidance on strategic sourcing and the development of agreements*

ISO 37000, *Governance of organizations — Guidance*

3 Terms, definitions and abbreviations

For the purposes of this document, the terms and definitions given in ISO 41011 and the following apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <https://www.electropedia.org/>

3.1

business unit

discrete and accountable function or sub-function within an organization

[SOURCE: ISO/TS 21089:2018, 3.28, Note 1 to entry removed]

3.2

facility management organization

FM organization

entity responsible for facility management on the strategic, tactical and operational levels

[SOURCE: ISO 41011:2024, 3.1.4, modified]

3.3

greenwashing

false or misleading information, either intentionally or inadvertently, regarding the environmental or sustainability attributes of a product, asset and activity, which can have consequences on the assessment of financial and non-financial materiality

[SOURCE: ISO 14100:2022, 3.1.15]

3.4

governance

principles, policies and framework by which an organization is directed, controlled and held to account

[SOURCE: ISO 21505:2017, 3.1, modified]

3.5

management line-of-sight

visibility of decision making from the strategic to the tactical and operational levels in an organization

3.6

self-deliver

service delivery based upon the provider's own resources

[SOURCE: ISO 41014, 3.4.3, modified]

3.7

siloed working

organizational condition where groups, divisions or departments within the same organization are disinclined to share knowledge, information and data

3.8

special purpose vehicle

legal entity that separates a financial arrangement or project from its parent organization

3.9

value driver

anything that is added, or perceived to be added, to a product or service to improve its worth to stakeholders

[SOURCE: ISO 41014, 3.6.2]

Abbreviations

ESG	environmental, social and governance
GHG	greenhouse gases
RACI	responsible, accountable, consulted and informed

4 Essentials of the FM organization

4.1 Governance

4.1.1 Oversight

Governance creates and maintains an organization with a clear purpose that delivers long-term value consistent with the expectations of its stakeholders. This means that decision-making within an organization is based on its ethos, culture, norms, practices, behaviours, structures and processes. These elements form the bedrock of governance, empowering an organization to thrive with purpose and resilience. The purpose of governance lies in cultivating environments where trust is nurtured, aspirations are realized and collective well-being is prioritized. Resilience is about an organization's adaptive capacity in a complex and changing environment.

Governance provides a structured framework to which the organization needs to adhere for its effective management and achievement of its long-term goals. Top management should apply governance to all areas of administration to establish clarity and control over processes to maintain successful, sustainable business operations. This is assisted by having a management line-of-sight from the highest (i.e. strategic) level through to the lowest (i.e. operational) level in the organization.

From the perspective of the supply chain, implementation of governance helps an organization manage risks arising within the supply chain, ensuring compliance, promoting ethical business relationships, preserving transparency in operations, achieving cost control, maintaining a high-level of quality, promoting sustainability, steering continual improvement and facilitating change.

The FM organization should take actionable steps to foster an integrated approach to governance, bringing together top-down and bottom-up perspectives by:

- establishing robust communication channels to facilitate dialogue and feedback between leadership and stakeholders;
- prioritizing capability-building initiatives to ensure alignment with overarching business objectives and local needs;
- incentivizing collaboration and cross-functional teamwork, breaking down siloed working and fostering collective ownership;
- implementing regular monitoring and evaluation mechanisms to track progress and adapt strategies accordingly;
- cultivating a culture of inclusivity and empowerment, where diverse voices are valued and integrated into decision making;
- highlighting the necessity of awareness on the breadth of statutory compliance and how it might be managed.

Additional proactive measures, such as periodic audits, continuing personal development and professional development, are fundamental to maintain compliance and should be mandated by the FM organization. Fostering a culture of accountability and responsibility, empowers teams and individuals and enables them to navigate challenges, including regulations, with confidence.

The FM organization should develop a coherent policy on its governance and make it available to all reasonable inquirers (see also ISO 41018).

4.1.2 Leadership and management

There is a close relationship between leadership, management and stakeholder engagement. While each is essential to achieve an organization's objectives, distinctions need to be drawn. Leadership embodies vision, inspiration and the ability to navigate complexity while creating alignment among diverse stakeholders. Management focuses on strategic planning, resource allocation and operational oversight, dealing directly